

Post Event Summary Report **2005 White House Conference on Aging** **Civic Engagement in an Older America**

In 2004, The Gerontological Society of America (GSA) received a grant from The Atlantic Philanthropies to launch “Civic Engagement in an Older America,” a five-year initiative to stimulate research leading to the development of programs and policies that will increase opportunities for civic and social engagement by older adults. One of the Project’s first activities was to convene a series of forums and focus groups in conjunction with the 2005 White House Conference on Aging (WHCoA). The forums gathered input from a diverse group of professionals and stakeholders, including corporate leaders, researchers, government officials, and community representatives. The focus groups collected opinions from older adults in three age cohorts: leading-edge boomers (50-59 year-olds); 60-69 year olds; and adults 70 and older. All participants also completed written surveys.

This report summarizes the information gathered in those forums, focus groups, and surveys.

EVENTS:

Public Forums

	<i>Engaging Older Adults in Society</i>	<i>Maximizing Civic Engagement of Older Adults</i>	<i>Engaging Older Adults in Society</i>	<i>Civic Engagement of Older Adults: Labor Force and Retirement Trends</i>
Location	Rachel D. Murrah Civic Center, Winter Park FL	George Warren Brown School of Social Work, Washington University, St. Louis MO	Burton Barr Central Library, Phoenix, AZ	Boston University, Boston MA
Date	February 3, 2005	February 15, 2005	February 25, 2005	February 28, 2005
Attendees	125	110	150	85
Sponsored By	GSA, The Atlantic Philanthropies, Orange County Government, City of Orlando, City of Winter Park, Senior Resource Alliance, and the Winter Park Health Foundation	GSA, The Atlantic Philanthropies, The Center for Social Development, George Warren Brown School of Social Work, and Washington University Center for Aging	GSA, The Atlantic Philanthropies, Civic Ventures, The Virginia G. Piper Charitable Trust, and the Phoenix Public Library	GSA, The Atlantic Philanthropies, Boston University Aging Research Consortium
WHCoA Participation	Remy Aronoff	Dorcas Hardy and Robert Blancato	Robert Blancato	Robert Blancato

Focus Groups

Twelve focus groups were held in February and March 2005 in eight locations in Florida, Missouri, and Arizona. An online focus group was also conducted in late March-early April 2005 with individuals from Massachusetts and Florida.

Background

Research shows that today's and tomorrow's older Americans want to make volunteering and national service a priority in later life. As such, it is necessary to develop the federal policy and public and private institutions needed to facilitate their participation. Towards this goal, GSA organized forums and focus groups to learn more about current civic engagement initiatives, existing barriers, and to determine potential solutions for enhancing and expanding volunteer opportunities for older adults.

Priority Issue #1:

Update and expand current public and community service programs.

The increasing longevity, health, independence, wealth, and education of today's and tomorrow's older adults demands that we update and create new public institutions and programs that will help society benefit from the tremendous reservoir of skills and experience in our rapidly growing older adult population.

Barriers:

- The three Senior Corps programs currently administered by the Corporation for National and Community Service have income eligibility, age eligibility, service scope, and time commitment requirements that were designed nearly four decades ago and significantly limit participation in these programs.
- Current limitations on funding/resources.
- Few programs to address baby boomers' transition into retirement and civic engagement activities.
- National service programs such as AmeriCorps and the Peace Corps have traditionally favored youth and young adults, and have incentive structures that are geared toward youth.

Proposed Solutions:

- Request the Government Accountability Office (GAO) to conduct a comprehensive, systematic study of the effectiveness of all federal civic service programs (AmeriCorps, Senior Corps, USA Freedom Corps, Peace Corps, SCORE) in engaging older adults in volunteer activities.
- Build on the nation's successful senior service programs—*RSVP*, *Foster Grandparents* and *Senior Companions*, and other federal civic service programs by:
 - expanding and adapting them to effectively engage the growing population of retiring baby boomers in volunteering;
 - encouraging innovation and pilot projects for new recruitment strategies;
 - changing age and income eligibility requirements;
 - adding transferable education or healthcare benefits; and
 - providing greater flexibility in service scope and time commitment.

Priority Issue #2:

Provide incentives and recognition for paid or unpaid service in areas facing critical shortages, such as education, transportation, homeland security, mental health services, and independent living support for seniors.

In the coming years, communities may increasingly rely on volunteers to provide vital services. Studies find that Americans age 50 to 70 are interested in work—now and in retirement—that serves their community and people in need. They believe, however, that Social Security, health care, and pension benefits eligibility rules and regulations are an obstacle to work in retirement. Removing barriers and perceived barriers and creating a range of incentives to encourage older Americans to share their time, skills, and experience is in our national interest.

Barriers:

- Local and state governments lack resources for services, such as transportation, that help to facilitate civic engagement among the elderly.
- Social service agencies lack the resources to adequately train and compensate volunteers.
- Current IRS law does not allow volunteers to deduct the value of volunteer hours. However, they can deduct uncompensated expenses such as mileage, uniforms, and parking.
- Many older adults do not have the skills or training required to perform volunteer work in these vital areas of need.

Proposed Solutions:

- Establish credits or vouchers that cover the transportation costs of seniors who volunteer.
- Establish non-refundable tax credits (pegged at the prevailing federal minimum Wage) for hours of volunteerism in community service.
- Establish non-transferable education credits (such as President Bush’s proposed *Silver Scholarship* proposal) that would award scholarships to older adults who tutor children.
- Establish grants or tax credits for continuing education and training or re-training costs borne by those who want to improve their access to volunteer positions.

Priority Issue #3:

Linking adult volunteers with appropriate and rewarding volunteer opportunities.

At the same time the nation faces potential labor shortages in critical areas including education and health care, a new generation of older Americans would like to keep working—full-time, part-time, paid, and unpaid—in their so-called retirement years. Despite the potential win-win situation, there is little evidence that communities are prepared for this new environment.

Barriers:

- Ageism and negative attitudes towards older individuals.
- Lack of a local inventory of community needs and older adult volunteers’ skills.
- Few resources to inventory local community needs and older adult volunteers’ skills.

- Lack of flexible work schedules to accommodate older workers' desires for alternatives to continuous, full-time employment.
- Lack of ability by communities to match volunteer opportunities with appropriate volunteers.

Proposed Solutions:

- Communities should develop a needs and assets inventory to match the skills and talents of residents with programs that need help to better serve the community.
- Grant programs should be created to:
 - Develop a standard approach to community needs and volunteer resources assessment, including a tool kit communities can use;
 - Establish demonstrations in states to explore innovative models to help baby boomers transition from work to community/national service roles;
 - Enable senior centers (under the Older Americans Act) to provide baby boomer transition services;
 - Examine civic engagement opportunities for the aging network (under Title IV of the Older Americans Act);
 - Refocus existing programs, such as Experience Corps, to demonstrate how employees with flexible work schedules could service as volunteers.
- Establish a standard toll-free number (such as the 211 Social Services Hotline) that communities can use to link volunteers with volunteer opportunities.
- Provide subsidies, tax credits, and other incentives to encourage companies to implement or expand corporate volunteer programs for their employees.
- Encourage the business and nonprofit sector to create alternative paid work and volunteer work options that will use older adults' skills and experience and accommodate their preferences.

Priority Issue #4:

Improving public awareness of volunteering and civic service as a critical component of healthy aging and healthy communities.

Research on the health benefits of volunteer activity is compelling—but not well known to the public or policymakers. Studies following people over their lives link community engagement to prolonged physical and mental health in later life. Volunteer activity decreases incidences of heart disease, diabetes, and cardiovascular disease, and improves mental health. Beyond the individual physical and mental benefits, communities benefit tremendously from volunteers, who enhance the work of paid staff and extend public investments in child, youth, and senior care.

Barriers:

- The public, professionals, and policymakers do not generally recognize the 'value' of volunteer work.
- The public and private sectors have not publicized the value of civic engagement.

- Baby boomers generally have been less involved in volunteering and other forms of civic engagement than their parents' generation.

Proposed Solutions:

- Recruit baby boomers and older adults through a public education campaign—promoting the physical and mental health benefits of volunteering and encouraging all sectors of society to view older Americans as community assets, not liabilities.
- Conduct a cost-benefit study to develop a strong 'business case' demonstrating the value of volunteer services performed and the financial savings achieved—especially in terms of Social Security, Medicare, and Medicaid program costs savings.

Priority Issue #5:

Encourage companies to support and promote volunteering by their employees and retirees

Almost 75% of America's volunteers are members of the paid work force. The workplace, therefore, is the ideal location to connect with and engage potential volunteers—including former employees and retirees. And, research reveals that employer-supported volunteering produces value for the company as well as for employees and the wider community.

Barriers:

- Few companies have flexible employment and volunteer time policies to encourage employee and retiree volunteerism.
- The business sector lacks awareness of the direct impact of corporate community involvement on the company "bottom line."

Proposed Solutions:

- Establish a bipartisan commission to examine the role of current tax laws, retirement and health care policies, and pension rules as incentives or disincentives for volunteer service by employed and retired adults.
- Provide subsidies, tax credits, and other incentives to encourage companies to create flexible employment and volunteer time policies such as job sharing, sabbaticals, phased retirement, and paid/unpaid leave for volunteering.
- Encourage the President's Council on Service and Civic Participation to expand the *President's Volunteer Service Award* to honor companies—not just individuals—that excel in their efforts to promote and support volunteer service and civic participation by their employees.
- Create a "best practices" database of corporate volunteer programs, including evidence-based and outcome-focused program models.
- Expand efforts to inform the corporate sector about the benefits of employer-supported volunteering that flow back to the employer, including increased employee productivity and morale, lower absenteeism, more media attention, and stronger ties to the communities in which they operate.